



## REQUEST FOR PROPOSAL (RFP)

### LEGAL COUNSEL TO REPRESENT THE VALUE ADJUSTMENT BOARD

RFP Number: 11-0002 Contracting Officer: Susan Dugan, CPPB  
RFP Opening Date: 8/4/2010 Pre-Proposal Date: None  
RFP Opening Time: 3:00 p.m. Issue Date: 7/20/2010

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At the date and time specified above, all proposals that have been received in a timely manner will be opened, recorded, and accepted for consideration. The names of the vendors submitting proposals will be read aloud and recorded. The proposals will be available for inspection during normal business hours in the Office of Procurement Services within ten (10) working days after the opening date. A separate contractual document will be signed by the County and the awarded vendor.

#### NO-RESPONSE REPLY

If any vendor does not want to respond to this solicitation at this time, or, would like to be removed from Lake County's Vendor List, please mark the appropriate space, complete name below and return this page only.

- ☐ Not interested at this time; keep our firm on Lake County's Vendors List for future solicitations for this product / service
- ☐ Please remove our firm from Lake County's Vendor's List for this product / service.

#### VENDOR IDENTIFICATION

Company Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
E-mail Address: \_\_\_\_\_ Contact Person: \_\_\_\_\_

**Section 1.1: Purpose**

The purpose of this solicitation is to retain an attorney to represent the Value Adjustment Board.

**Section 1.2: Designated Procurement Representative**

Questions concerning any portion of this solicitation shall be directed in writing [fax and e-mail accepted] to the below named individual who shall be the official point of contact for this solicitation. Questions should be submitted no later than five (5) working days before the opening date.

Susan Dugan , CPPB, Senior Contracting Officer  
Lake County BCC  
Office of Procurement Services  
315 W. Main Street, Room 416  
PO BOX 7800  
Tavares, FL 32778-7800

Phone : 352.343.9839  
Fax : 352.343.9473  
E-mail: sdugan@lakecountyfl.gov

No answers given in response to questions submitted shall be binding upon this solicitation unless released in writing as an addendum to the solicitation by the Lake County Department of Procurement Services.

**Section 1.3: Method of Award – Considering Qualifications and Pricing**

Award will be made to the vendor which submits the overall proposal that is judged to provide the best value to the County. Proposals will be evaluated based upon the following criteria:

1. Qualifications.
2. Proposed cost/fee schedule.
3. Reports from direct and indirect references.
4. Responsiveness and completeness of the written proposal to these instructions with regard to the Scope of Services.
5. Other relevant criteria.

**Section 1.4: Term of Contract - Upon Delivery**

This contract shall be effective immediately following the date of execution by the County and remain in effect for twelve (12) months. The contract prices resultant from this solicitation shall prevail for the full duration of the initial contract term.

**Section 1.5: Option to Renew**

Prior to, or upon completion, of the initial term of this contract, the County shall have the option to renew this contract for two (2) additional twelve (12) month periods under the same terms and conditions. Continuation of the contract beyond the initial period, and any option subsequently exercised, is a County prerogative, and not a right of the vendor. This prerogative may be exercised only when such continuation is clearly in the best interest of the County.

**Section 1.6: Method of Payment - Monthly Invoices**

The vendor shall submit monthly invoices by the tenth (10th) calendar day of each month. These invoices shall be submitted to the County Finance Department. The invoices shall reflect the type of service provided to the County in the prior month.

All invoices shall contain the contract and/or purchase order number, date and location of delivery or service, and confirmation of acceptance of the goods or services by the appropriate County representative. Failure to submit invoices in the prescribed manner will delay payment, and the vendor may be considered in default of contract and its contract may be terminated. Payments shall be tendered in accordance with the Florida Prompt Payment Act, Part VII, Chapter 218, Florida Statutes.

**Section 1.7: Delivery**

Services shall be rendered as stated herein.

**Section 1.8: Acceptance of Services**

The services rendered as a result of an award from this solicitation shall not be deemed complete, until accepted by the County and shall be in compliance with the terms herein, fully in accord with the specifications and of the highest quality.

In the event that the service does not conform to the specifications, the County reserves the right to terminate the contract and will not be responsible to pay for any such service.

**Section 1.9 Delivery of Solicitation Response**

Unless a package is delivered by the vendor in person, all incoming mail from the U.S. Postal Service and any package delivered by a third party delivery organization (Fed-EX, UPS, DHL, private courier, etc) will be opened for security and contamination inspection by the Lake County Clerk of the Circuit Court Mail Receiving Center in an off-site secure controlled facility prior to delivery to any Lake County Government facility, which includes the Lake County

Department of Procurement Services.

To be considered for award, a bid or proposal must be received and accepted in the Procurement Services Office prior to the date and time established within the solicitation. Allow sufficient time for transportation and inspection.

Each package shall be clearly marked with the applicable solicitation number and title. Ensure that your bid or proposal is securely sealed in an opaque envelope/ package to provide confidentiality of the bid or proposal prior to the solicitation closing.

If you plan on submitting your bid or proposal **IN PERSON**, please bring it to:

LAKE COUNTY PROCUREMENT SERVICES  
315 W. MAIN STREET  
4TH FLOOR, ROOM 416  
TAVARES, FLORIDA

If you submit your bid or proposal by the **UNITED STATES POSTAL SERVICE, (USPS)** please mail it to:

LAKE COUNTY PROCUREMENT SERVICES  
PO BOX 7800  
TAVARES, FL 32778-7800

If you submit your bid or proposal by a **THIRD PARTY CARRIER** such as Fed-EX, UPS, or a private courier, please send it to:

LAKE COUNTY PROCUREMENT SERVICES  
MAIL RECEIVING CENTER  
416 W. MAIN STREET  
TAVARES, FL 32778

Facsimile (fax) or electronic submissions (e-mail) will not be accepted.

#### **Section 1.10: Completion Requirements for Request For Proposal (RFP)**

One (1) original proposal and one (1) complete copy of the proposal submitted by the vendor shall be sealed and delivered to the Office of Procurement Services no later than the official closing date and time. Any proposal received after this time will not be considered and will be returned unopened to the submitter. The County is not liable or responsible for any costs incurred by any vendor in responding to this RFP including, without limitation, costs for product and/or service demonstrations if requested. When you submit your proposal, you are making a binding offer to the County.

Each proposal shall be prepared simply and economically, providing a straightforward, concise

description of the proposer's capabilities to satisfy the conditions and requirements of this RFP. Fancy bindings, colored displays, and promotional material are not desired. Emphasis in each proposal must be on completeness and clarity of content. The County emphasizes that the proposer concentrate on accuracy, completeness, and clarity of content.

To facilitate analysis of its proposal, the proposer shall prepare its proposal in accordance with the instructions outlined in this section. If the proposal deviates from these instructions, such proposal may, in the County's sole discretion, be rejected.

**Section 1.11 Proposal Submittal - Proposals shall be organized as follows:**

- A. Resume
- B. Background of related experience - preference will be given to an attorney that can demonstrate experience in real or personal property tax matters, the public records act, and the sunshine law.
- C. Proof of Florida Bar Membership
- D. Price Proposal Section
- E. Confirmation of Compliance with the Statement of Work, Section 2.2, Qualifications of Legal Counsel, listed within this document.

**STATEMENT OF WORK**

**Section 2.1** Provide Legal Counsel to the Lake County Value Adjustment Board (Board)

**Section 2.2** Qualifications of Legal Counsel

1. Each value adjustment board must appoint private legal counsel to assist the board.
2. Legal counsel must be an attorney in private practice. The use of an attorney employed by government is prohibited. Counsel must have practiced law for over five years and meet the requirements of Section 194.015, Florida Statutes. Experience in real or personal property tax matters, the public records act, and the sunshine law. will be given preference.
3. An attorney may represent more than one value adjustment board.
4. An attorney may represent a value adjustment board, even if another member of the attorney's law firm represents one of the enumerated parties so long as the representation is not before the value adjustment board.
5. Legal counsel should avoid conflicts of interest or the appearance of a conflict of interest in their representation.
6. Legal Counsel shall not represent the property appraiser, the tax collector, any taxing authority, or any property owner in any administrative or judicial review of property taxes.

**Section 2.3** Role of Legal Counsel to the Board

1. The legal counsel shall have the responsibilities listed below consistent with the provisions of law.
  - a. The primary role of the legal counsel shall be to advise the board on all aspects of the value adjustment board review process to ensure that all actions taken by the board and its appointees meet the requirements of law.
  - b. Legal counsel shall advise the board in a manner that will promote and maintain a high level of public trust and confidence in the administrative review process.
  - c. Legal counsel is not an advocate for either party in a value adjustment board proceeding, but instead ensures that the proceedings are fair and consistent with the law.
  - d. Legal counsel shall advise the Board of the actions necessary for compliance with the law.

- e. Legal counsel shall advise the board regarding:
    - 1. Composition and quorum requirements;
    - 2. Statutory training and qualification requirements for special magistrates and members of the board;
    - 3. Legal requirements for recommended decisions and final decisions;
    - 4. Public meeting and open government laws; and
    - 5. Any other duties, responsibilities, actions or requirements of the Board consistent with the laws of this state.
  - f. Legal counsel shall review and respond to written complaints alleging noncompliance with the law by the Board, special magistrates, board clerk and the parties. The legal counsel shall send a copy of the complaint along with the response to the department. This section does not refer to routine requests for reconsideration, requests for rescheduling, and pleadings and argument in petitions.
2. The Legal counsel shall, upon appointment, send his or her contact information, which shall include his or her name, mailing address, telephone number, fax number and e-mail address, to the department by mail, fax, or e-mail to:

Department of Revenue  
Property Tax Oversight Program  
Attn: Director  
P.O. Box 3000  
Tallahassee, FL 32315-3000  
Fax Number 850-922-7951  
e-mail address: VAB@dor.state.fl.us

**By Signing This Proposal the Proposer Attests and Certifies That:**

- It satisfies all legal requirements (as an entity) to do business with the County.
- The undersigned vendor acknowledges that award of a contract may be contingent upon a determination by the County that the vendor has the capacity and capability to successfully perform the contract.
- The proposer hereby certifies that it understands all requirements of this solicitation, and that the undersigned individual is duly authorized to execute this proposal document and any contract(s) and/or other transactions required by award of this solicitation.

**Certification Regarding Felony Conviction**

Has any officer, director, or executive of the bidding entity been convicted of a felony during the past ten (10) years? ☐ Yes ☐ No (Check one)

**Conflict of Interest Disclosure Certification**

Except as listed below, no employee, officer, or agent of the firm has any conflicts of interest, real or apparent, due to ownership, other clients, contracts, or interests associated with this project; and, this bid is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a proposal for the same services, and is in all respects fair and without collusion or fraud.

Exceptions: \_\_\_\_\_

Item Number	Item Description	Unit	Unit Price
1	Legal Counsel for Value Adjustment Board	Per Hour	\$_____

**General Vendor Information and Proposal Signature:**

Firm Name: \_\_\_\_\_

Street Address: \_\_\_\_\_

Mailing Address (if different): \_\_\_\_\_

Telephone No.: \_\_\_\_\_ Fax No.: \_\_\_\_\_ E-mail: \_\_\_\_\_

FEIN No. \_\_\_\_\_ - \_\_\_\_\_ Prompt Payment Terms: \_\_\_\_\_ % \_\_\_\_\_ Days, net \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Print Name: \_\_\_\_\_ Title: \_\_\_\_\_